

Karl Marx and Imperialism

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The word ‘imperialism’ as it came to be used in the 20th century, especially among the following of Bukharin and Lenin, denotes the global spreading of the capitalist mode of production, or rather a particular view of it, not unlike the more recent – but less clearly politically charged – term ‘globalisation’. As the words ‘imperialism’ and ‘imperialist’ hardly occur in Marx’s writings, a discussion of Marx’s view on this matter and of the extent to which the concept ‘imperialism’ is either indebted to Marx or rather implies an alternative to the Marxian conception would therefore be coextensive with a discussion of Marx’s theory of the dynamics of capitalism in its entirety. (For succinct statements of what Marxian theory has to offer on the issue of globalisation, the dynamic of the capitalist mode of production, and ‘imperialism’ in this most generic sense of the term see Postone (1993, especially chs. 1, 9 and 10), and Sutton (2013). On its most recent rearticulation as ‘Empire’ – in the sense of a ‘limitless’ form of imperialism – see Hardt and Negri [2000], Holloway [2002] and Murphy [2012, ch. 5].)

Setting itself a more modest goal, this essay will briefly examine Marx’s actual (and, for its time, fairly conventional) use of the word (as a near-synonym of ‘Caesarism’ or ‘Bonapartism’) and how it relates to the predominant 20th-century meaning of ‘imperialism’ as it emerged in the decade or so leading up to the First World War. The essay will then focus on Marx’s views on some of the aspects of ‘imperialism’ that seem to be most discussed in the literature, namely his views on colonialism, anti-colonial movements, and the meaning, in this context, of the notion of historical progress.

‘Imperialism’ in Marx’s usage

Karl Marx grew up in a reasonably well-to-do, caring, and harmonious middle-class family in the Rhenish town of Trier. His father was a lawyer, an enlightened man, and a moderate liberal who had converted from Judaism to Protestantism only a short time before Karl Marx was born. Perhaps not insignificantly, Trier (a Roman foundation, one of the oldest cities in Germany and a centre of Catholicism) had been conquered by Napoleon in 1794, and French imperial government acted to reinforce the liberal traditions of the town that fell to Prussia in 1815. The Prussian monarchy (in the eyes of contemporary German nationalists an anti-imperialist liberator *avant la lettre*) reversed Jewish emancipation, and this was in fact what forced Marx’s father to

convert as he did not want to lose his career and livelihood (Blumenberg [1962], Nimtz [2000], Rühle [1928].).

Marx studied Law, History, and (increasingly) Philosophy at the Universities of Bonn and Berlin from 1835–41, after initially also producing large amounts of poetry. As he became more and more involved in the ‘young-Hegelian’ circle of radical intellectuals, an academic career became unthinkable due to the anti-liberal political climate of the period, and Marx became an editor of a new, liberal-democratic journal based in Cologne. When this publication had to close down, he moved to Paris in 1843 and accepted a position as editor of a German-language journal there. His journalistic work forced him to deal with social and political issues, while he continued to sharpen his philosophical critique – especially of Hegel – and began to study political economy as well as the French socialist literature. In 1845 he was expelled from France and moved to Brussels where he stayed until he was expelled from Belgium, too, in March 1848. In these intense five years, Marx published his first essays, including some of his most influential pieces such as ‘A Contribution to the Critique of Hegel’s Philosophy of Right. Introduction’, and his first two books containing critiques of contemporary French and German socialist theories; he also started his collaboration with Friedrich Engels, whom he first met in 1844, and produced copious drafts that were to become highly influential after their posthumous publication, including the *German Ideology*. In 1845 Marx visited England for the first time, where he settled in 1849 as a stateless person after a year of revolutionary activity in Germany. From 1851 onwards his principal source of income was his journalistic work for the *New York Tribune*; at the same time he engaged in the sustained research that resulted chiefly in the 1867 publication of the first volume of *Capital* and an enormous amount of draft material, some of which was edited by Engels as the second and third volumes of *Capital*. The most famous portion of the unpublished material of that period has, since its publication in 1939 under the name *Grundrisse*, come to be seen as perhaps the most profound statement of Marx’s theory of capitalist modernity apart from the first volume of *Capital*.

Marx was at no point an academic, though, or anyhow a detached scholar or ‘Great Thinker’; primarily he was throughout his life a fighter who saw study and research as self-evidently important parts of the struggle for human emancipation. It is fitting therefore that the text most directly connected to his name is the *Manifesto of the Communist Party* that he co-wrote with Engels. Published just before the February 1848 revolution, it was of little influence

at the time, though in the 20th century it became probably the most influential political pamphlet ever published up to that point. A decade in which human emancipation remained off-stage ended when slavery was abolished in Russia in 1861 and between 1863 and 1865 in the US, and also in Europe things started moving again. Marx was elected a member of the General Council of the International Working Men's Association (the 'First International') from its foundation in 1864, and remained its chief strategist until its dissolution in 1876 as a victim of another reactionary backlash following the military destruction of the Paris Commune of 1871.

Marx used the term 'imperialism' in his 1871 *The Civil War in France* in what was then its common meaning, namely denoting a specific form of the exercise of state power, considered in its relation to class relations (Fisch et al. 1982: 181). The term was generally used at the time to indicate changes that were under way at the time, especially in the aftermath of the Great Depression, and visible especially in the regimes of Napoleon III, Bismarck, and Disraeli: 'imperialism' would refer in these contexts to rule on the basis of alliances of the elites with the working class against the liberal bourgeoisie, or indeed against parliament, and governance above particular political parties, modelled on the imperial Roman example (176) and based on centralised state agencies and monopolies (177; Koebner, Schmidt 1964, ch. 1; on the various usages of the term 'empire', see Leonhard 2013). The necessity to address the 'social question' and to react to economic crises and the emergence of the American competition on the world market through colonialism is also sometimes implied in the term 'imperialism'. On occasion, it meant 'neo-mercantilism' (Fisch et al.: 207). In the English context, the term was typically used for those who wanted to maintain colonialism (178). The aspect of colonialism was not necessarily the dominant one, though, as 'imperialism' referred to a whole range of aspects of governance of empires; its anti-liberal impetus sits uneasily with the fact that colonialism was a key item on the agenda of 19th-century liberalism itself (Mehta 1999; Mantena 2010).

The often-quoted passage in *The Civil War in France* in which Marx uses the term runs as follows:

Imperialism is, at the same time, the most prostitute and the ultimate form of the state power which nascent middle-class society has commenced to elaborate as a means of its

own emancipation from feudalism, and which full-blown bourgeois society had already finally transformed into a means for the enslavement of labor by capital. (Marx 1971: 72)

‘Imperialism’, discussed by Marx here in the context of Napoleon III, is presented as ‘the ultimate form’ of bourgeois ‘state power’, whereby the state is understood to have emerged initially as a means of bourgeois society’s emancipation from feudalism and then, in the course of the consolidation of bourgeois society, turned into ‘a means for the enslavement of labor by capital.’ Imperialism is the end result of this process whereby the state becomes also ‘the most prostitute’, which seems to mean the most subject to arbitrary and violent (ab-)use. The ‘prostitute’ character of the developed bourgeois state (indicating a certain degree of conceptual emptiness, indifference, and the possibility that it can be ‘bought’ and used for any purpose by anyone who is prepared to pay for the privilege) follows on from Marx’s comments on the modern state in *The Eighteenth Brumaire*, written nearly two decades earlier at the beginning of the rule of Napoleon III.

Leon Trotsky remarked that ‘this definition has a wider significance than for the French Empire alone, and includes the latest form of imperialism, born of the world-conflict between the national capitalisms of the great powers’ (from *The Defence of Terrorism*, quoted in Winslow 1931: 717). Trotsky pointed thereby to the connection between Marx’s use of the term (not commonly used in socialist theory until the late 1890s) and its 20th-century meaning. The implication here is that the internal and external aspects of the exercise of state power are closely inter-related.

The main shift in meaning, first clearly expressed by the liberal writer Hobson (1902) and then most prominently by Lenin (1917), was that ‘imperialism’ became the name of a historical period, or ‘stage’ in the (apparently unavoidable) evolution of capitalism. A key contribution was the description in 1902 by Hilferding of a change in the function of protective tariffs: rather than enabling ‘infant industries’ to develop to a state where they would be able to compete on an unprotected world market (as in the conception of Friedrich List), protective tariffs now had the function of warranting high prices on the domestic market that would allow a manufacturer to compete successfully (i.e. at much lower prices) on the world market. In other words, through modern, ‘imperialist’ protective tariffs, domestic consumers subsidise the manufacturer’s world-

market activities (Fisch et al. 1982: 217). Protectionism is here no longer a merely temporary means in a conception that assumes that in the end all the world will interact on a ‘free-market’ basis. Hilferding’s second contribution to the modern concept of ‘imperialism’ was his description of *Finance Capital* (1906), in which financial and industrial capital are effectively fused, as the dominant political agent in the ‘imperialist’ period. All modern conceptions of ‘imperialism’, liberal as well as socialist, describe versions of what could be addressed summarily as ‘organised capitalism’, i.e. the capitalism after the eclipse (since the Great Depression) of ‘classical’ liberalism. This is of course the same capitalism that is expanding in the (long-standing but accelerating) process of what is now referred to as ‘globalisation’, of which colonialism was (or, arguably, is) a principal means. The ‘Bonapartism’ that Marx addressed with the term ‘imperialism’ was indeed a pioneer of this wider constellation. It could be added that ‘anti-imperialism’ is almost as old as ‘imperialism’ itself: an ‘anti-Imperialist League’ was founded in 1898 in Boston (one year before Kipling wrote ‘The White Man’s Burden’) to defend republican principles and oppose militarism; it had at times 150,000 members (Fisch et al. 1982: 189). Its crucial domestic implications were pointed out by Anton Pannekoek, an anarcho-syndicalist theoretician of the European labour movement in the years immediately preceding the First World War, who argued in 1916 that imperialist capitalism escalates and generalises exploitation of various groups in society beyond the proletariat, provoking also a generalisation and radicalisation of socialist struggles, and renders the perspective of parliamentary struggle for socialist reform all the more anachronistic and implausible as state policy is increasingly decided in institutions other than parliament (Pannekoek 2012; see also Bricianer 1978).

Apart from the publication of Lenin’s pamphlet on imperialism of 1917, the most decisive date for 20th-century socialist and left-liberal debates on imperialism and colonialism was 1928 when the Sixth Congress of the Communist International adopted the position that imperialism retarded the industrial development of the colonies. Up to this point, the issue had remained controversial as many in the communist movement and parties had stuck to the older, Marxian position that expected colonialism at least in the long run to result in industrialisation (which in turn it considered a necessary precondition for general human emancipation). Warren describes the 1928 Comintern position as one of the first statements of ‘the underdevelopment outlook that was to become the stock in trade of liberal development-economists after the Second

World War’ (Warren 1980: 85). As it is not possible here to discuss the Bolshevik position in detail, it must suffice to point out that it can be understood as a simplified and mechanical articulation of a contradiction that is central to Marxist theory, namely the dialectic between capitalism (and its principal modern political form, the nation state) and emancipation. Lenin, on the one hand, strongly affirmed the Marxian notion of the progressiveness of capitalism to the extent that he promoted (in theory but more importantly in practice) the intense and rapid development of the capitalist mode of production under the name of ‘socialism’, while he blamed the worldwide spread of capitalism, under the name of ‘imperialism’, for retarding and blocking in the colonies the modernisation process that would (at least potentially) result in general human emancipation. In other words, this position implies a split between, as it were, the benign side of capitalism that brings development (i.e., more capitalism) and therewith the potential of emancipation (to be ‘built’ under a socialist regime that will at some point in the process turn communist) and its malign side that must be fought as ‘imperialism’. The latter (capitalism that refuses to spread evenly) is to be fought in particular by national liberation movements that in the process establish modern nation states, which are the natural environments for the development of capitalism in its progressive guise. This conception reflects but also misconstrues a genuine aspect of Marxian theory, the dialectic between capitalism and progress, robbing it of its dialectical character. There is a world of a difference between attempting (by way of social struggles) to *exploit* a presently unfolding contradictory historical process, and attempting (by way of political revolution and party dictatorship) to *organise and promote* such a process. (On Lenin’s advocacy of state-capitalism, whose ‘transition to full socialism would be easy and certain’, see Marcuse [1971: 42]. Marcuse discusses the role of the concept of ‘imperialism’ in Bolshevism in chapter 2. The notion that the Bolshevik revolution structurally, not merely accidentally, due to the necessity of warfare, developed the capitalist mode of production was formulated in the 1930s by a variety of individuals in the context of the left-Marxist (‘council-communist’) opposition to Bolshevism (see Mattick 1978). An overview of (left-communist as well as Trotskyist and Maoist) discussions of the Soviet Union as ‘state-capitalist’ is contained in van der Linden [2007].)

The second half of this essay will point to Marx’s own take on some of the areas of the debate that are central to what in the 20th century has been discussed as ‘imperialism’. It is important to keep in mind in this context that even the concept of ‘colonialism’ – as used in the

20th century – was not available to Marx. ‘Marx did not have a generic term to describe the rule of a more advanced nation state over a more backward area’, such as the 20th-century concept of colonialism. He used the term ‘colonialism’ more narrowly to refer to ‘the settlement of uninhabited areas or areas from which the indigenous inhabitants have been driven out (such as Australia and America)’ (Brewer 1980: 27–28).

Marx’s views on the phenomena addressed as ‘imperialism’ in the 20th century

An obvious starting point for a discussion of Marx’s views on imperialism (in the 20th-century sense of the word) is the following famous passage in the Communist Manifesto:

The bourgeoisie, by the rapid improvement of all instruments of production, by the immensely facilitated means of communication, draws all, even the most barbarian, nations into civilisation. The cheap prices of its commodities are the heavy artillery with which it batters down all Chinese walls, with which it forces the barbarians’ intensely obstinate hatred of foreigners to capitulate. It compels all nations, on pain of extinction, to adopt the bourgeois mode of production; it compels them to introduce the so-called civilization into their midst, i.e., to become bourgeois themselves. (Marx and Engels 2004: 121)

Taken on its own, this passage seems to take sides with a European, imperialist ‘civilization’ that rapidly improves means of production and communication and deserves to be applauded for defeating obstinate and xenophobic ‘barbarians’. The only hint at distancing in this paragraph itself is the use of the phrase ‘the so-called civilization’. However, no text by Marx, especially not one whose composition is as strongly rhetorical, almost poetical, as the *Manifesto*, allows isolated readings of single paragraphs. The context of the quoted passage, from the beginning of the *Manifesto*’s first chapter ‘Bourgeois and Proletarians’, is a section that elaborates the statement or thesis, ‘The bourgeoisie, historically, has played a most revolutionary part’. The text enumerates various aspects of this ‘revolutionary part’ in 11 paragraphs, most of which begin with ‘The bourgeoisie ...’. Significantly, this list – sometimes described as a ‘panegyric’ to the

bourgeoisie and to bourgeois modernity – is followed by a statement that is marked by the word ‘but’ as the antithesis of the preceding one: ‘But we have seen’. What ‘we have seen’ is that the means by which the bourgeoisie became revolutionary were created in the previous, feudal historical epoch, and that likewise the capitalist period is already creating the means by which it will be replaced in the not so distant future. The rhetorical power of the text derives from the build-up, over 11 cumulative paragraphs, of a deliberately one-sided description of the bourgeoisie’s revolutionary qualities, making the revolutionary qualities of the proletariat (that, so the argument runs, is already in the process of succeeding the bourgeoisie) look even greater. As it was the purpose of the text to support and mobilise the revolutionary energies of the (emerging) proletariat in what Marx and Engels understood to be a revolutionary situation (the winter of 1847/48), it needed to glorify the modern contemporary and future enemy whose immanent negation was the proletariat; at the same time, it denounced as merely reactionary the previous, already superseded enemy (feudalism etc., including its rebirth in various forms of backward-looking ‘socialist’ garb). The bourgeoisie and its ‘so-called civilization’ are welcomed, as their triumph means the replacement of rather stable and static forms of exploitation by one that carried its own self-destruction in itself, clearing the way for general human emancipation: the ‘free association where the free development of each is the precondition of the free development of all’ (163). As the *Manifesto* understands capitalism to have been ‘globalised’ from the start, it also imagines human emancipation whose preconditions it creates to be global. (It admits of course that ‘the struggle of the proletariat with the bourgeoisie’ is ‘at first a national struggle’, ‘in form’, ‘not in substance’, though: the nation state is merely a formal aspect of a substantially global social relationship.) It must be added, however, that the remarks about ‘Chinese walls’ and ‘the barbarians’ intensely obstinate hatred of the foreigners’ are not dialectically cashed in anywhere later in the text, which makes these remarks stand out as somewhat ethnocentric, pointing to the fact that Marx ‘gave little specific attention to non-Western societies in this period’. After he moved to cosmopolitan London, though, he increasingly began to fill ‘this gap in his worldview’ (Anderson 2010: 9–10).

Marx’s take on imperialism cannot be understood without understanding his general approach to capitalism and modernity for which the *Manifesto* is a key reference. The *Manifesto* was written in order to clarify how Marx’s and Engels’s position differed from that of competing socialist groups and writers. The defining characteristic of their position was the dialectic in the

relationship of the movement that would bring about general human emancipation to the bourgeoisie and the capitalist mode of production, as well as, by implication, liberalism and nationalism. This was and, indeed, remained throughout modern history, a relationship of antagonism as well as mutual dependency, as no bourgeoisie ever defeated feudalism (or any other pre-capitalist social formation) without using popular movements as its infantry; and likewise, no popular movement was ever able to sideline (or 'leap over') the bourgeoisie; the latter has a habit of already being installed in the institutions of the popular movement itself, no matter how 'anti-bourgeois' that movement might aim or conceive itself to be. This is an aspect of modern capitalist society being a 'totality' that imposes near-identical patterns of development on all spheres and areas. The combination of two characteristics distinguishes the position taken by Marx and Engels from that of other socialists of the time: first, a visceral, revolutionary hatred of any form of 'the old regime'; and second, a continuing effort to figure how the 'free association' can slowly, painfully emerge out of the antagonistic but interdependent struggles that the bourgeoisie and the proletariat conduct against all the 'barbarians' of all the old regimes. All the latter are builders of walls: ghetto walls, Chinese walls, culture walls, state border walls.

As the triangular relationship between 'old regime' (feudalism, 'barbarians', 'Oriental Despotism' etc.), the capitalist bourgeoisie and general human emancipation was conceived on a global, non-nation-state level and as dynamically expanding from the beginning, it also continued to frame Marx's position on what we would now call colonialism and imperialism. Brewer points out that Marx's complex position on British domination of India was shaped by his view of the change in the relation between Britain and India that came with the Industrial Revolution: 'While merchant capital and its allies exploit and destroy without transforming, industrial capital destroys but at the same time transforms' because (in Marx's words) '[y]ou cannot continue to inundate a country with your manufactures, unless you enable it to give some produce in return' (Brewer 1980: 54). Therefore, Marx saw British manufacturers seek the destruction of the East India Company and the corruption inherent in the form of imperialism that predated the industrial age. Brewer summarises Marx's position thus: 'British rule in India (a) causes misery, (b) creates the preconditions for massive advance and (c) must be overthrown before the benefits can be enjoyed' (58). As in the *Manifesto*, Marx uses in his journalistic writings on India a style that includes 'deliberate juxtaposition of the most exalted praise for material achievements and the shocking images used to bring home the concomitant human

misery' (59). Straightforward imperialist plunder (i.e. the imperialism of the pre-industrial period) is recognised by Marx as a contributing (but not decisive) factor in the development of capitalism in Britain, a view that is consistent with the fact that the capitalist mode of production failed to develop early in other empire-building countries such as France and Spain (43).

The insistence on the dialectical nature of modern, bourgeois 'so-called civilization' as bringing intense misery and exploitation but also the possibility of general human emancipation is key to understanding Marx's numerous comments on anti-colonial struggles. While his view of capitalist modernity was ambivalent, Marx's hatred for 'the old regime' and any form of patrimonialism, caste-thinking, slavery, and authoritarianism (including the modified forms in which they continue to exist *within* capitalism) was unequivocal. Careful study of the primary and secondary literature shows that Marx (ever remaining an unreconstructed '1848' revolutionary) responded enthusiastically to any struggle against exploitation and domination that occurred (such as in China, India, the US, Ireland, Poland, Russia) but also moderated (sometimes throttled) his enthusiasm when dialectical analysis led him to think a struggle failed to further the promise of emancipation that he saw as intrinsic to capitalist modernity. (Most recent detailed accounts of the complexities of Marx's position can be found in Anderson [2010] and Pradella [2013]. For critical comments on Anderson see Stoetzler [2013]. Critical contributions on the Leninist legacy of anti-imperialism include Goldner [2010] and Bassi [2010]. Useful older accounts include Owen and Sutcliffe 1972, Kiernan 1974 and Mommsen 1981.) As Marx saw the phenomena that in the 20th century were addressed as 'imperialism' as normal and regular aspects of capitalist modernity (rather than a phenomenon extrinsic to the capitalist mode of production, or a 'stage' in its evolution), his view of the dialectic of capitalist modernity extended also to 'imperialism'.

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online version of the *Encyclopaedia* these changes will be reversed. When using the printed version you might want to take note of the following corrigenda:

- First page, first column:

The word 'imperialism' as it came to be used in the 20th century, especially among followers of Lenin...

should read:

The word 'imperialism' as it came to be used in the 20th century, especially following Bukharin and Lenin,...

- First page, first column :

the capitalist mode of production, or rather a particular version of it...

should read:

the capitalist mode of production, or rather a particular vision of it...

- At the bottom of the first column: 'capital' *should read* 'foundation'

- Second column line 4/5:

to Prussia in 1815. The Prussian monarchy (in the eyes of contemporary German nationalists) reversed Jewish emancipation, and this...

should read:

to Prussia in 1815. The Prussian monarchy (in the eyes of contemporary German nationalists an anti-imperialist liberator *avant la lettre*) reversed Jewish emancipation, and this...

- Page 4, first column, line 7:

misconstrues a genuine aspect of Marxian theory: the dialectic between capitalism and progress robbing it of its dialectical character.

should read:

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